



# Spotlight on Germany

Tuesday 22 March 2022



# Jill Gallard

British Ambassador to Germany





Welcome by Jill Gallard, British  
Ambassador to Germany

24/03/2022



# Introduction



- I am Jill Gallard, Her Majesty's Ambassador to Germany.
- I am delighted to be able to open this event today.
- This is a **welcome opportunity** to provide information on trading between the UK and Germany, and in particular **to help make businesses in Northern Ireland aware of export opportunities on the German market.**



# My connection to Northern Ireland

- **Born in Northern Ireland**, County Tyrone (Omagh), and grew up in County Antrim.



- 18 years in Northern Ireland, followed by 4 years at university in Edinburgh, have made me very aware of how **important** it is for British Embassies overseas **to represent all 4 parts of the UK**.
- Germany is a federal political system, with 16 different regions, all with their different identities – **the diversity of the UK's 4 nations really resonates here.**

24/03/2022

# The importance of trade & exporting



**MADE IN BELFAST**  
**SAVING LIVES IN COUNTRIES**

**“We’re proud to export our patient specific 3D surgical models to 25 countries worldwide.”**  
Roger Johnston, Axial3D

Let's get exporting 

**MADE IN THE UK  
SOLD TO THE WORLD**

  
HM Government

24/03/2022

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Ties between the UK and Germany have never been so important, and so is our bilateral trade.

Germany is the UK's:



2<sup>nd</sup> largest  
trading partner



2<sup>nd</sup> largest  
export market



2<sup>nd</sup> largest  
import market

UK exports to Germany support almost **500,000 jobs in the UK**, with German exports to the UK supporting over **800,000 jobs in Germany**.



# The UK-EU Trade & Cooperation Agreement



- The terms of trade have fundamentally changed.
- The UK-EU Trade and Cooperation Agreement is a deal grounded in the principles of **free trade and strong co-operation**.
- This is **good news** for trade between the UK & Germany – particularly in the sectors most important to our bilateral relationship, such as **Chemicals, Pharmaceuticals and Automotive**.

# Exports are a critical part of our economy



- Exports **support millions of jobs** and there are important links between trade and productivity.
- Exporting businesses are **more competitive**, pay higher wages and are more profitable.
- Exporters play a crucial role in **levelling up** the economy across the whole of the UK.

# Why export to Germany?

Stable economy

Highly developed infrastructure

Certainty & predictability

Good base to build up export elsewhere in Europe



Opportunities for UK exporters especially in:



Health & Life Sciences



Technology & Digitalisation



Clean Growth



# Cooperation between German & NI companies



- Partnership between **Randox Laboratories**, UK's largest manufacturer of in-vitro diagnostics & German technology giant **Bosch**
- **Wrightbus** (world's first hydrogen double-decker bus) chose German company **Voith** as its exclusive supplier of the electrical drive system for its buses in Europe
- Northern Ireland's aerospace cluster around **Bombardier** successfully entering the **Airbus** supply chain

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# How does DIT support?



- Refreshed cross-government **Export Strategy: Made in the UK, Sold to the World.**
- Second HQ in Darlington - and **new offices** in Scotland, Wales and **Northern Ireland**, which will focus on supporting businesses and export growth across the UK
- Expansion of **DIT's Export Support Service**, which makes it easier for exporters and those considering exporting to access the information they need.

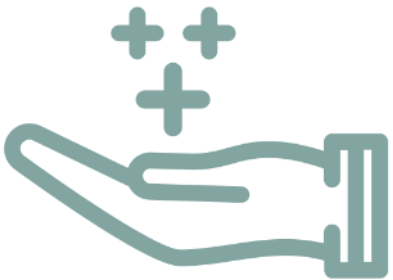




# DIT in Germany



- We work closely alongside our **partners** including Invest Northern Ireland.
- **Over 30 trade and investment specialists** based at the British Embassy in Berlin and our Consulates-General in Dusseldorf and Munich.
- They are here to help you find and take advantage of export opportunities and **provide the support and advice** to succeed on the German market.







# Thank you for listening!

✉ Contact the [DIT Trade Hub](#)

📄 Export Support Service

<https://www.gov.uk/ask-export-support-team>

🐦 [@tradegovukDEU](#)

🌐 [@department-for-international-trade](#)

📘 [@uktrade](#)

📄 [Germany Market Guide](#)



## Robert Scheid

Director - United Kingdom & Ireland,  
Germany Trade & Invest





- Spotlight on Germany

# A NEW ERA OF BUSINESS OPPORTUNITIES

- Rob Scheid
- Director, UK & Ireland
- Germany Trade & Invest, London Office




# GTAI London



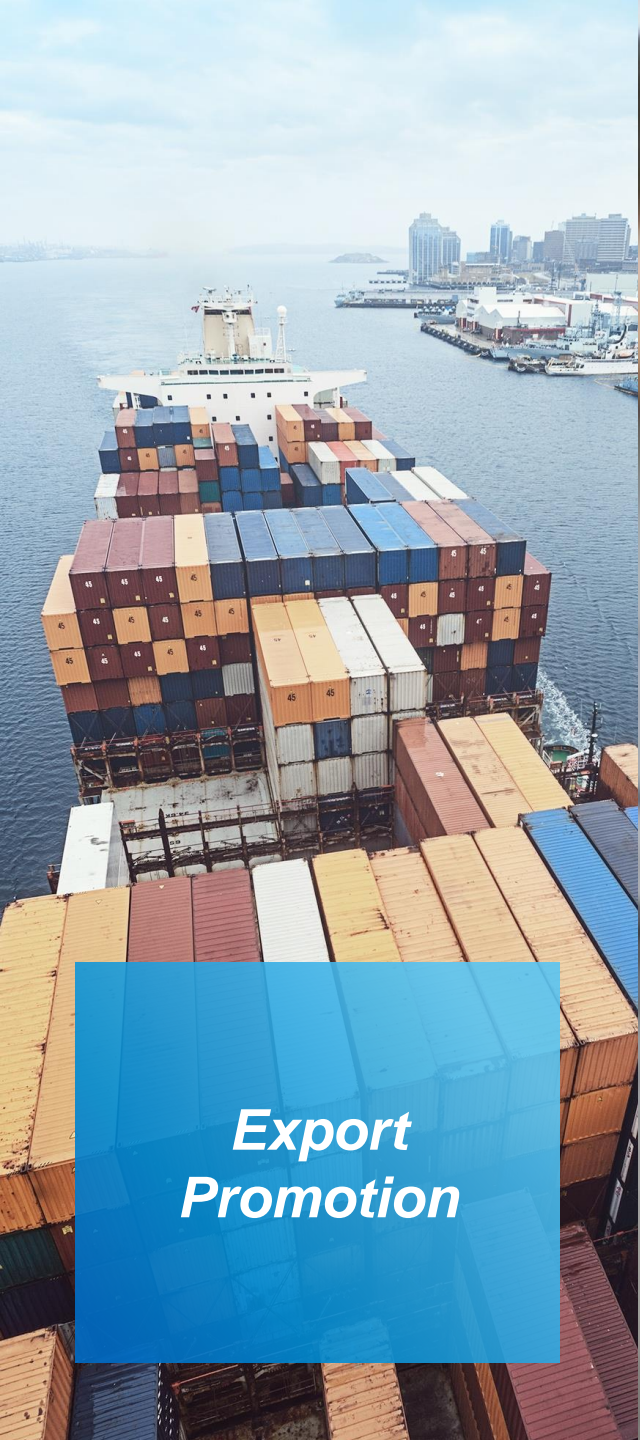
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**Germany Trade & Invest (GTAI) is the economic development agency of the Federal Republic of Germany.**





***Export  
Promotion***



***Investor  
Consulting***



***Location  
Marketing***



***New Federal  
States &  
Structural  
Transformation***

# Germany Trade & Invest supports companies expanding to Germany.



- **Market information**
- **Site selection support**
- **Tax/legal/financial info**



# What's New?

## Germany's traffic-light coalition signals new investment cycle

POWERED BY FDI MARKETS

The post-Merkel era promises green incentives, less red tape and more support for start-ups



Strong new direction: Olaf Scholz is powering Germany towards a green revolution

Danielle Myles, Alex Irwin-Hunt February 2, 2022



Germany's new government has named climate change as its top priority and promised reforms to bolster its start-up ecosystem as it aims to modernise Europe's biggest economy.

- Germany Goes Green(er)

Digitalize  
Deutschland

- Cut Red Tape

Innovation/Start-ups

Social Policy

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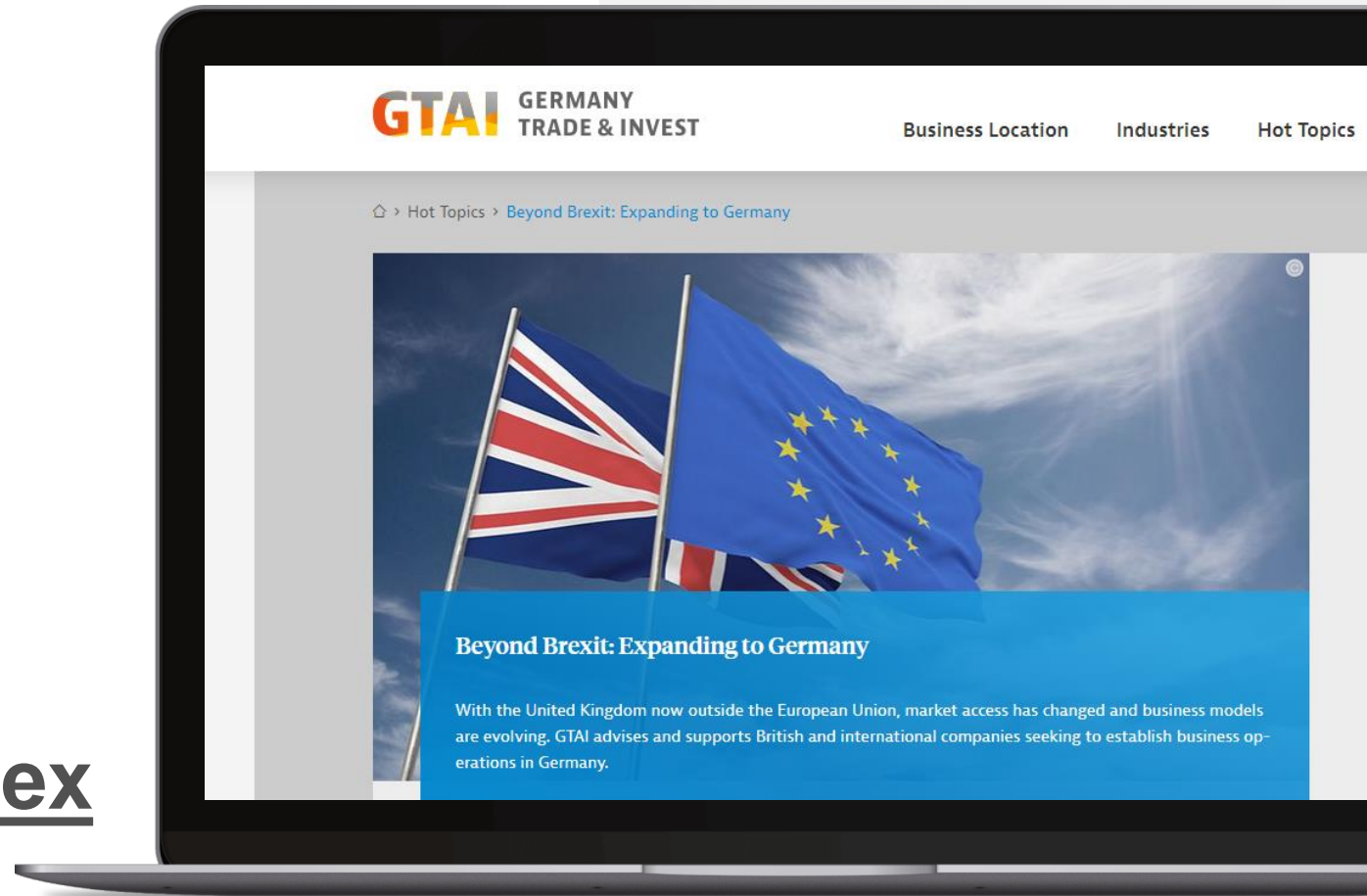
- For more information
- **[www.gtai.com](http://www.gtai.com)**
- [Robert.scheid@gtai.com](mailto:Robert.scheid@gtai.com)
- +44 7455 062620

# Beyond Brexit

- **Special**

- Tax & Legal Frameworks for UK companies
- Events and webinars
- FAQs

- [www.gtai.com/beyondbrexit](http://www.gtai.com/beyondbrexit)  
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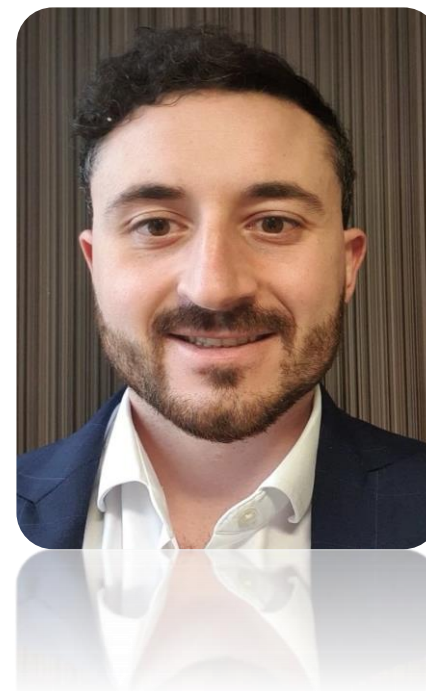


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**Nathan Wright**

Head of Wrightbus International







**Driving a greener future**







# Wrightbus

## Business Overview



October 2021



## 75 Years of Engineering Heritage

- A leading industry innovator of low emission diesel, hybrid, zero-emission hydrogen and electric buses as well as the iconic new Routemaster for London
- Transitioned from body only to complete manufacturer during 2007 to 2013 across the range
- 2015 Started manufacturing buses in Malaysia
- Relocated to a new 90 acre site (the old JTI facility) in 2018/2019 remaining in Ballymena
- Future proofing capability and capacity
- Business went into administration in 2019
- Jo Bamford purchased the business in October 2019
- Launched the world's first hydrogen double deck vehicle
- 2022 Launch Wrightbus Apprenticeship program in Malaysia

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# Growth Delivery

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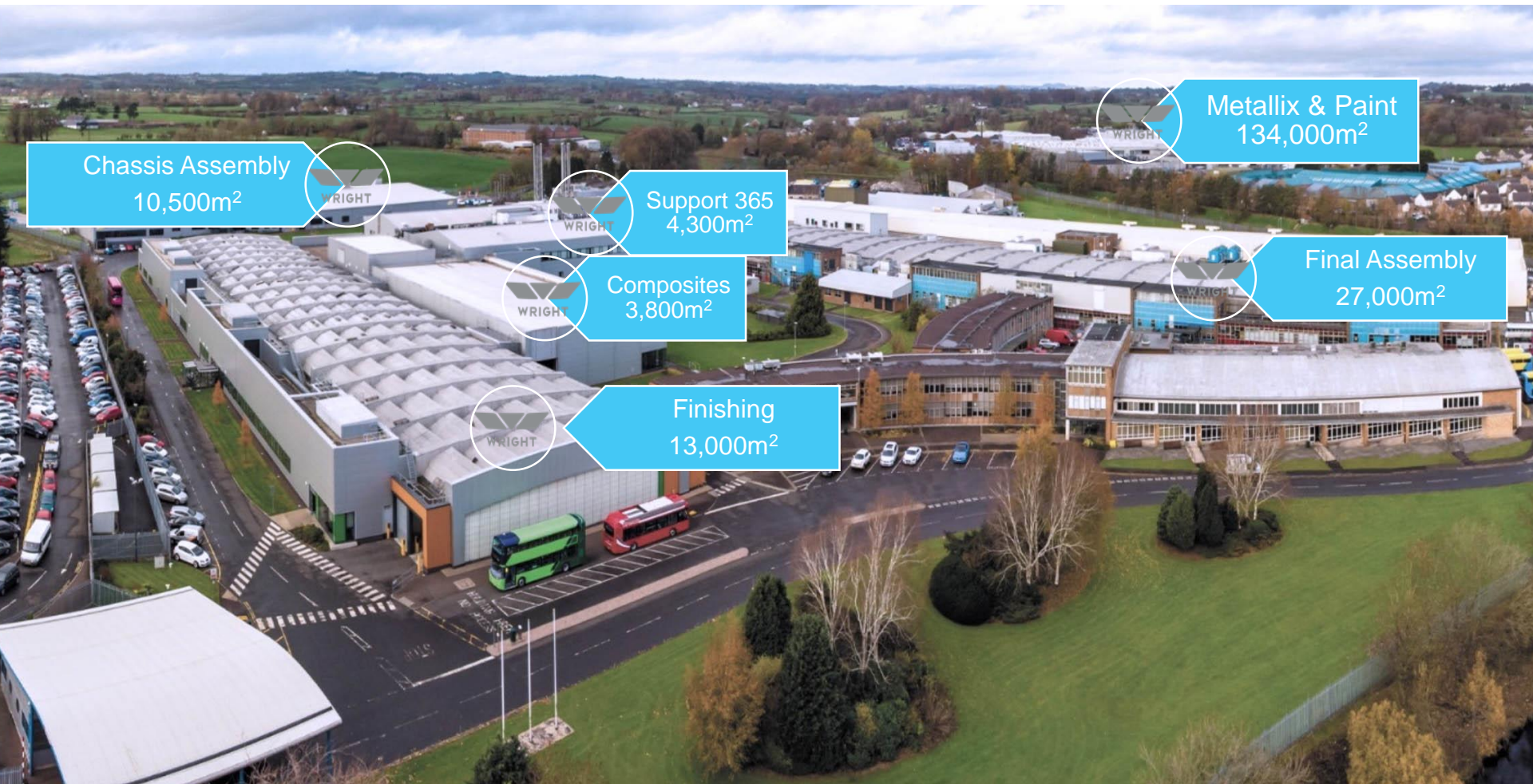
- Currently 780 people employed in the UK and 130 Employed internationally – Total 910
- Numbers to rise to 1100 during 2022
- Output from 2021 to 2022 will double
- In 2021 70% of buses manufactured will be diesel powered
- In 2022 70% of buses manufactured will be Zero Emission
- We will continue to innovate with 4 new product large product development projects next year

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# UK Headquarters



90 Acre Site in  
Ballymena,  
Northern Ireland

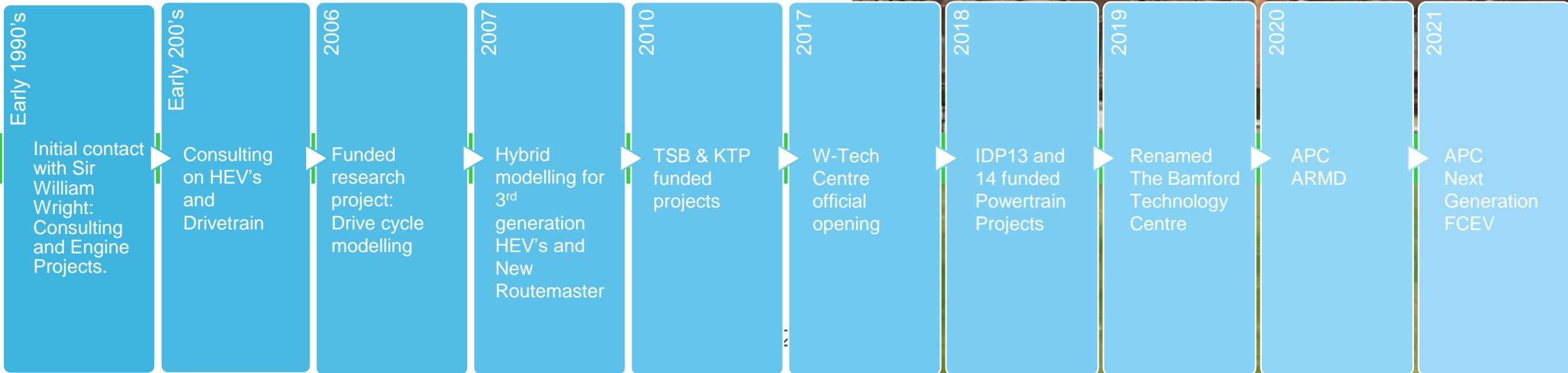


# Queens University Belfast

Bamford Technology Centre



QUEEN'S  
UNIVERSITY  
BELFAST



# Comprehensive Product Offering

First mover advantage in FCEV technology, combined with a reputation for product quality has positioned Wrightbus at the centre of a rapidly developing market and ability to grow globally.

## GB Kite

### GB Kite Hydroliner FCEV

Single deck, zero emission hydrogen bus



- Fast re-fuelling time,
- Ideal vehicle for long-distance travel.
- Range of up to 640 miles
- Capacity up to 90 passengers.

### GB Kite Electoliner BEV

The face of environment friendly transportation



- Cutting-edge features like a 2.5-hour charging time.
- Range of up to 300 miles on a single charge, making it an excellent vehicle for intra-urban travel.
- Capacity of 90 passengers.

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**Hydrogen Fuel-Cell**

**Next Generation Fuel-cell**  
(70/100 kW)

**350 bar H<sub>2</sub> storage tanks**  
(32kg H<sub>2</sub> ~400 miles range)  
(48kg H<sub>2</sub> ~ 610 mile range)

**Traction Battery**

**Highly efficient and quiet Electric Traction System**  
(280kW motor, inverter, distribution box & diagnostics all one supplier)

**Refuelling point**  
(~8 mins refuel)

**High capacity Traction Batteries**

Standardised VDA modules  
(340 kWh = 180 miles range)  
(454 kWh = 240 miles range)  
(567 kWh = 300 miles range)

**CCS 2.0 Charge point**  
(2 ½ hours @ 150kW,  
twin charging 1 ¼ hr)

**Highly efficient heat pumps**  
(HVAC + BTMS not shown)

**Highly efficient and quiet Electric Traction System**  
(280kW motor, inverter, distribution box & diagnostics all one supplier)

**Battery-Electric**



# STREETDECK FCEV | **HYDROLINER**

## Hydrogen Fuel-Cell



World's first production Hydrogen Double-Deck Bus, designed and built in Ballymena, NI.





JCB



Ryze



Hycap



## Telematics relationship with JCB

- Ability to work closely with JCB, one of the top 3 manufacturers in the construction industry globally.
- JCB have extensive experience >15 years in running full telematics services across large fleets
- Wrightbus are actively working with JCB to leverage existing knowledge and expertise to quickly scale their product offering
- Telematics will be key USP vs. competition in delivering the forecast plan
- Further opportunities to collaborate are available with engineering and process best practices

## Ryze Hydrogen & full infrastructure offering

- Uniquely positioned to collaborate with Ryze, a leading green hydrogen production & distribution company
- Ability to offer a one stop shop solution for both bus manufacturing and supply chain for green hydrogen
- Ryze currently supporting ZEBRA funding bids in collaboration with Wrightbus, with local authorities to offer a full Hydrogen solution to bus operators
- This will unlock further opportunities in aftersales, providing full GB Kite Hydroliner FCEV product services for buses and supply chain

## Long term capital in the clean energy sector

- Bamford family committed to carbon reduction across all of their business interests
- Leading the way in global hydrogen market across JCB, Wrightbus and Ryze
- Long term family investor committed to delivering the business plan
- Supportive of collaboration across their business interests to ensure best practice
- Future potential for Wrightbus to become a “capital partner” in conjunction with Ryze and lease new bus units to operators, taking the full asset and supply chain infrastructure off balance sheet

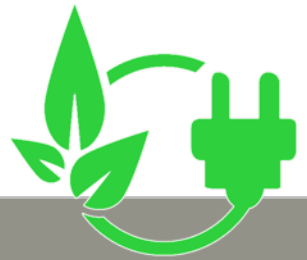




# End to End Solution



Infrastructure and Planning



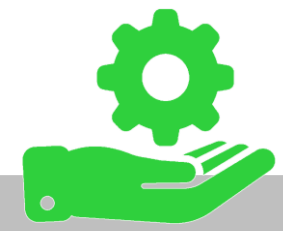
Fuel



Finance



Bus



Aftercare

Zero-emission business transformation partnership – 360 support services, for a seamless transition to the future of net zero.



# German Hydrogen Strategy

infrastructure." Green hydrogen and fuel cells are "a super complement to pure battery vehicles across all modes of transport".







**Wrightbus**  
Thank you.







## **Linda von Delhaes-Guenther**

Managing Director, AHP International

## **Franziska Wegerich**

Senior Manager & Consultant, AHP International







# Spotlight Germany

## DOING BUSINESS IN GERMANY

Dr. Linda von Delhaes-Guenther  
Managing Director, AHP International

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# Your Contacts

AHP International as a market expert can help you to boost your success in German-speaking Europe!



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# Agenda

- ❑ Introduction of AHP International**
- ❑ Market Overview, Megatrends and Covid-19 Impact on Germany**
- ❑ Success Factors to Enter and Explore the German Market**
- ❑ Trade Shows – Networking Opportunities**

# AHP International: One Stop Shop for Global Business

International Business Development Specialists with more than 25 Years in Business



## Key Services

Business Development in Europe and around the World





# Market overview, megatrends and Covid-19 impact on Germany

24/03/2022

# Germany in Numbers

Europe's strongest economy.

Located in the heart of the European market.

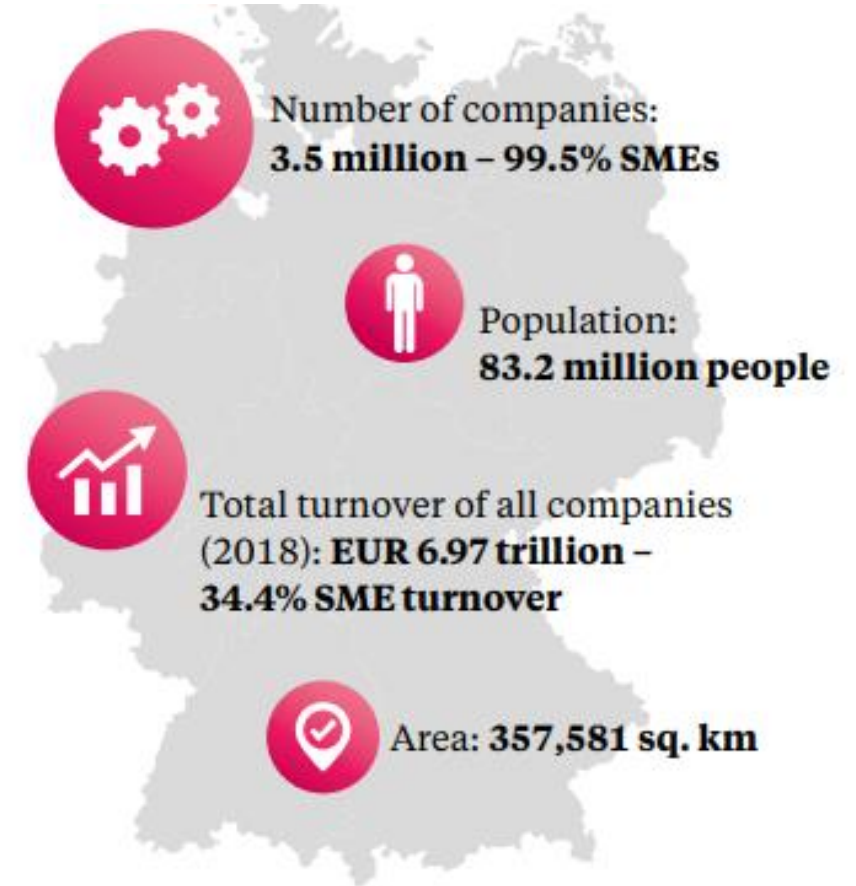
Export champion.

Political leader of the European Union.

Strong infrastructure with major airports in metropolitan areas.

SME-structure of Hidden Champions.

Import volume of more than one trillion USD.

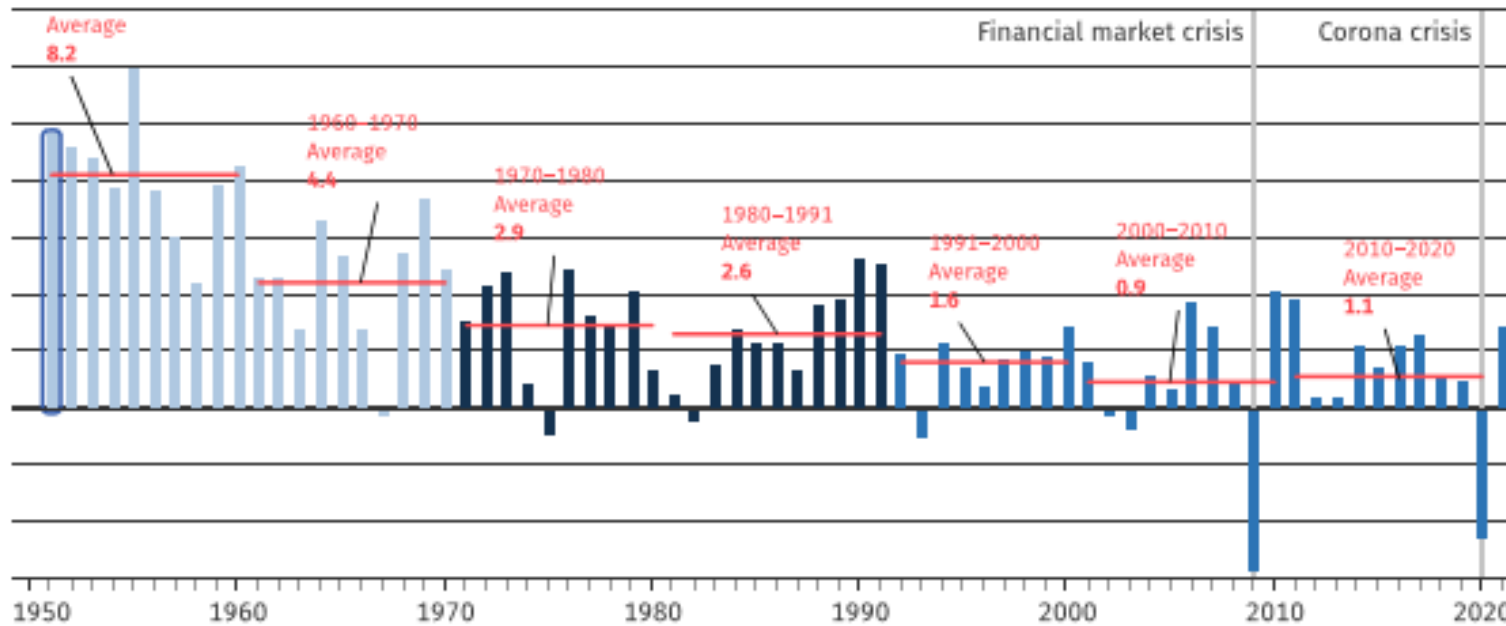




# COVID in the German Economy

## Economic growth

Gross domestic product, price adjusted, percentage change on a year earlier



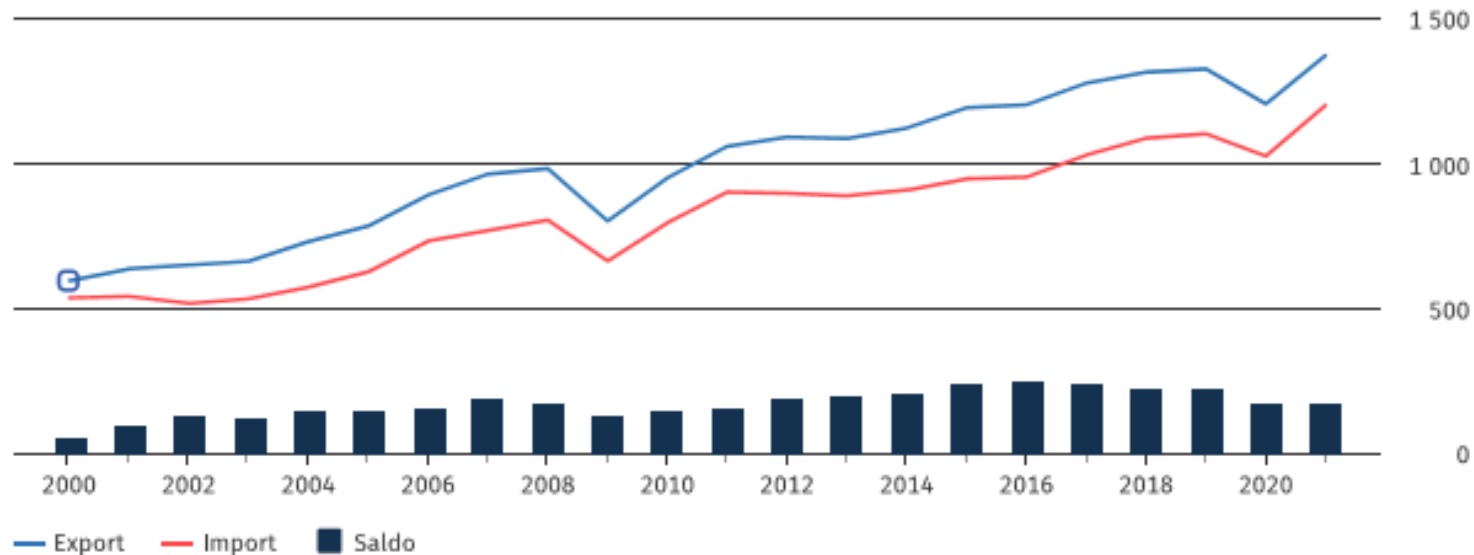
© Statistisches Bundesamt (Destatis). 2022

- There have been seven recession phases in Germany's post-war history
- In 2020, after a ten-year growth period, the German economy was again hit by a severe recession.
- The outbreak of the corona pandemic led to a decline in price-adjusted GDP of 4.6% at the end of the year.
- The economic development in 2021 was also highly dependent on the corona pandemic. The price-adjusted GDP was 2.9% higher in 2021 than in 2020.
- Despite the continuing pandemic situation the German economy managed to recover somewhat from the sharp fall in 2020.
- The economic performance has not yet reached its pre-crisis level again, though.

# COVID in the German Economy

## Entwicklung des deutschen Außenhandels

Milliarden EUR



2021 vorläufiges Ergebnis.

© Statistisches Bundesamt (Destatis), 2022

- Germany traditionally has a positive trade balance, which is essential for our economy.
- Even if the trade balance decreased during the Corona crises, it still remained positive.
- In 2021 (tentative numbers of the German statistical federal office Destatis) it was 172 bn EUR with exports of 1,375 bn EUR and imports of 1,203 bn EUR.
- **Global opportunities continue to be essential for Germany!**

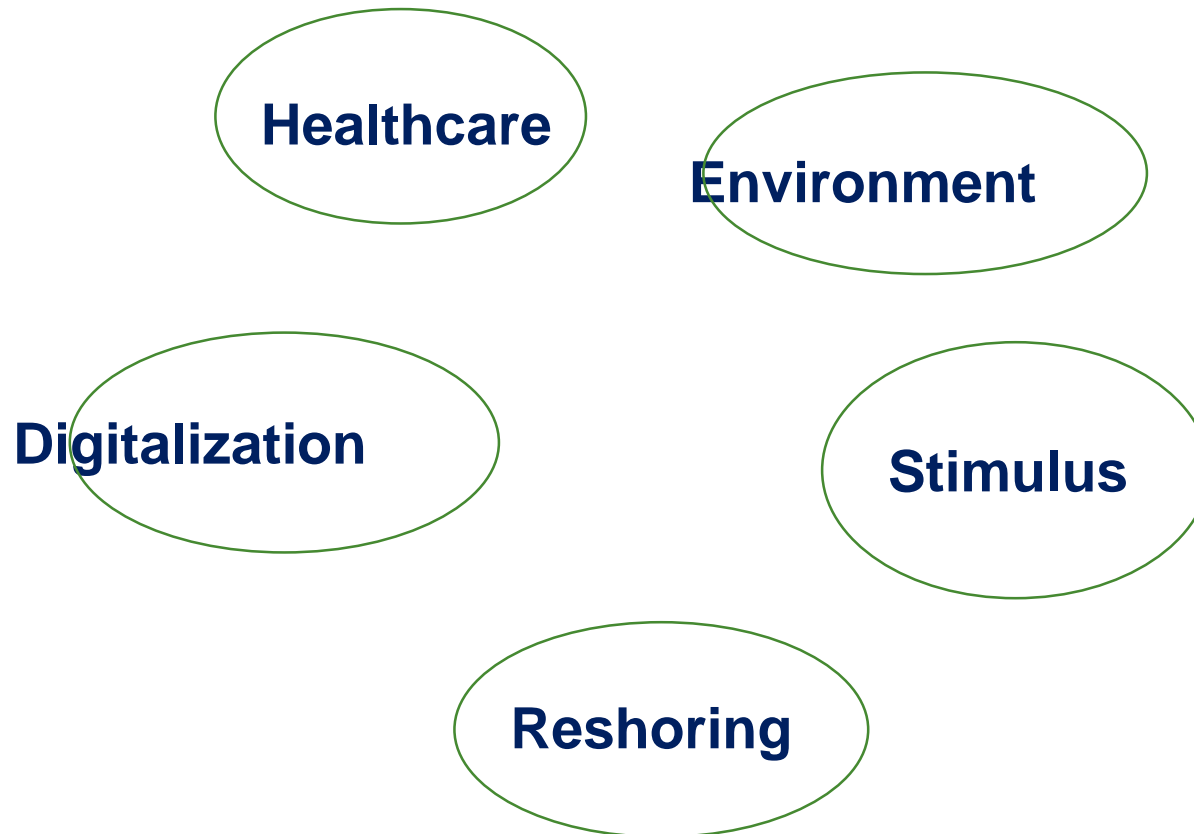


# Actual Covid-19 – Economic Stimulus Package in Germany

- Beginning of June 2020: economic stimulus package for 2020 and 2021 of 130 bln €
- 50 bln € for **general purposes** of strengthening demand, ensuring employment and stability, supporting investments of companies/municipalities - for example lowering of VAT, income tax, interim aid for SMEs, better rates of depreciation, corporate tax, tax loss carry forward etc.
- investment in **modernization of country** :
  - ✓ transition to e-mobility (public and private transportation, production of battery cells, charging stations, ship and airplane technology, hydrogen technology) and renewable energy for reaching of climate targets (photovoltaic, offshore wind energy, CO2 restoration of buildings)
  - ✓ investment in digitalization of country: in European artificial intelligence network of 5 bln €, nationwide 5G network until 2025 of 5 bln €, trial of new 6G technologies, building of at least two quantum computers, digitalization of administration)
- measures to **better protect against future pandemics** (development of vaccine, better digitalization of hospitals, smart technology like robots, cobots and artificial intelligence)
- investment in **education and research and development**

# 5 MEGATRENDS IN EUROPE

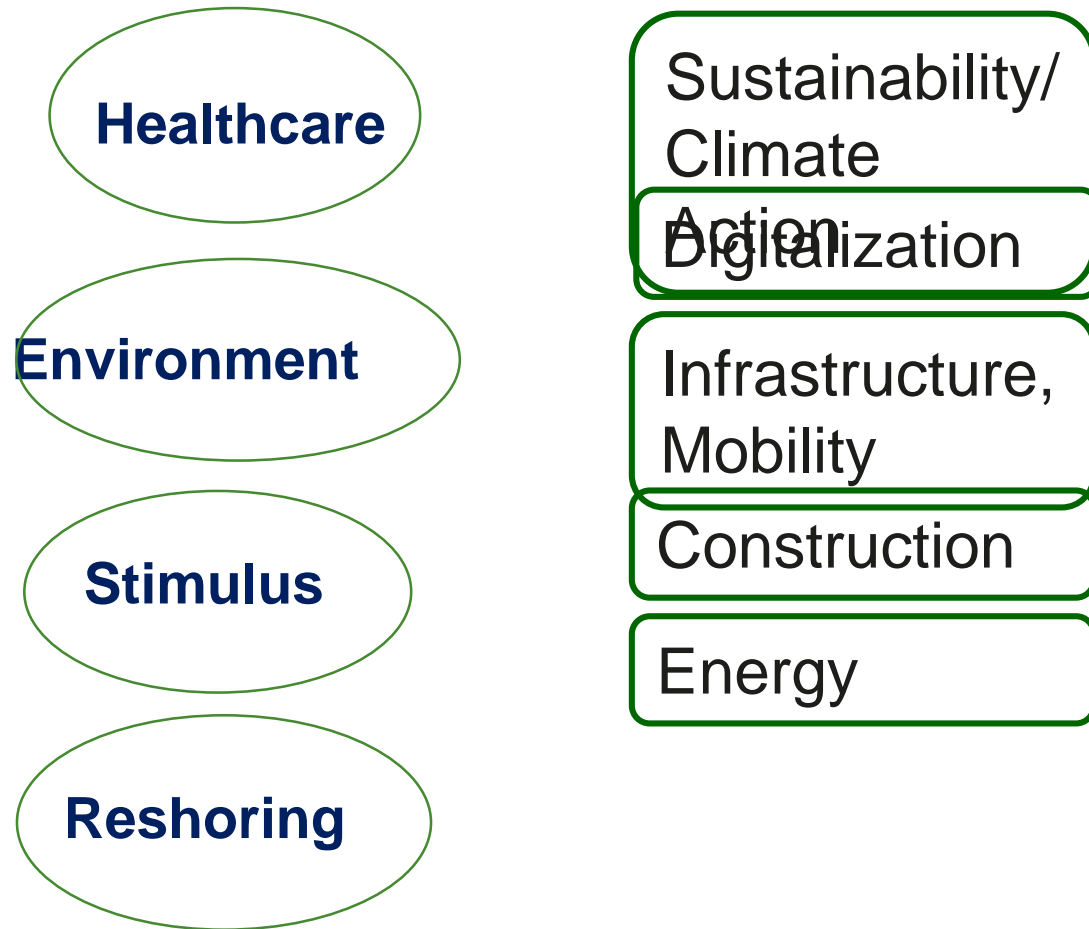
## Megatrends in Europe





# 5 MEGATRENDS IN EUROPE

## Megatrends in Europe



...will reflect on opportunities in:

**Healthcare and medical technology**

- **Digitalization solutions**
- **Industry 4.0 / IoT**
- **Electro-mobility**
- **Renewable energy**
- **Retail and e-commerce**
- **Logistical services**
- **Reshoring of value chains**

SECTOR	KEY TREND
<b>Healthcare and medical technology (Covid related)</b>	Hygiene and disinfectant concepts, air sterilization and ventilation, demand for PPE, disinfection solutions, beds, respiratory technology/ ventilators, thermometers, also healthcare IT/ e-health
<b>ICT and digitalization solutions (megatrend digitalization)</b>	smart manufacturing, smart homes, e-services, <b>digital media, e-learning, e-health, digital banking solutions and services, cyber security</b> , digital and precision farming etc.
<b>Mechanical engineering industry (megatrend restructuring of value chains)</b>	<b>Industrie 4.0/ IIoT</b> , smart technologies for robots, cobots and AI → in some markets and regions, own supply chains are increasingly built up in order to be no longer dependent on imports
<b>Retail and e-commerce (megatrend digitalization)</b>	Self-check out technology, <b>logistical services for e-commerce services</b> , sustainable packaging solutions
<b>Mobility and e-mobility sector (megatrend environmentally friendly economy)</b>	especially <b>hydrogen technology, battery cells, charging stations, maritime and airplane technology</b> → consumer demand for private vehicles is on the rise as mobility services and public transport fall out of favor

SECTOR	KEY TREND
<b>Agri-business and equipment</b> (megatrend digitalization, Covid related)	<b>Agriculture 4.0</b> , improved productivity/ mechanization, optimized supply chains and biotech for innovative crops and seeds
<b>Aerospace and MRO</b> (megatrend environment/ Covid related)	<b>hygienic treatment for cabins</b> and boarding/flight process, lightweight materials and technology for improved sustainability
<b>Logistics</b> (Covid related)	<b>Storage capacity technologies</b> like warehouse intralogistics, cooling technologies etc.
<b>International freight to/ from Europe</b> (megatrend digitalization/ Covid related)	<b>full-web solutions to manage international transportation processes</b> , real-time tracking of all modes of transport
<b>Renewable energies</b> (megatrend environmentally friendly economy)	<b>for industrial use and buildings</b> (European Green Deal)



What does that mean for your market and business development for the German market?

# Covid-19 & Germany's global footprint

- Germany is more than ever dependent on exports and thus global opportunities
- Germany has sustained its trade surplus even in the crisis
- The fundamentals of Doing Business with Germany remain in place
- The German market will be more competitive than ever
- COVID forced the majority of German companies to digitalize - mobile working + video conference tools were not very common
- Contacts remain harder to reach – less working hours, more strategic obligations
- Face-to-face meetings still essential for building trust and cooperating on complex and important strategic projects
- German companies extremely (new) risk averse

# What does this mean for you?

- Having first meetings, presenting your business and getting to know potential partners and clients works well virtually
- Developing joint projects works well virtually
  - ✿ Letter of Intent, NDA, Pre-Contracts
- HOWEVER, to really close the deal, personal contact is essential
  - ✿ In many cases important decisions are delayed because companies want a personal meeting
- BUT: German companies are despite the pandemic open for win-win proposals and strategic cooperations



# Where is digital an advantage, challenge? (level of complexity from lowest to highest)

## Digital in different types of cooperation approaches

- 1) Exports to Germany
- 2) Import Deals
- 3) Distribution Partnerships (on hold)
- 4) Joint Ventures (on hold)

- Digital is possible, but DO NOT expect immediate results!
- (Current) realistic timeline and expectations for digital cooperation projects:
  - ✿ Q2-Q4 2021 - Initial discussions and meetings
  - ✿ Q1/Q2 2022 - Closing a deal, Reaching an agreement

What are the success factors to enter and explore the German market?

# Success Factors: Company – Product/Service –

Pre condition: **Company** – Ready to export / import / cooperate?

## Market – People

1) **Product/Service** – Fitting to the German Market?

2) **Market**

- ❑ What are the Market Opportunities in Germany?

- ❑ What are the Market Entry Requirements?

- ❑ Right Choice of Sales Channel? Finding a German partner or direct client?

- ❑ Further steps in the strategy towards a functioning partnership?

3) **People** – How can I cope with the business mentality of the Germans?



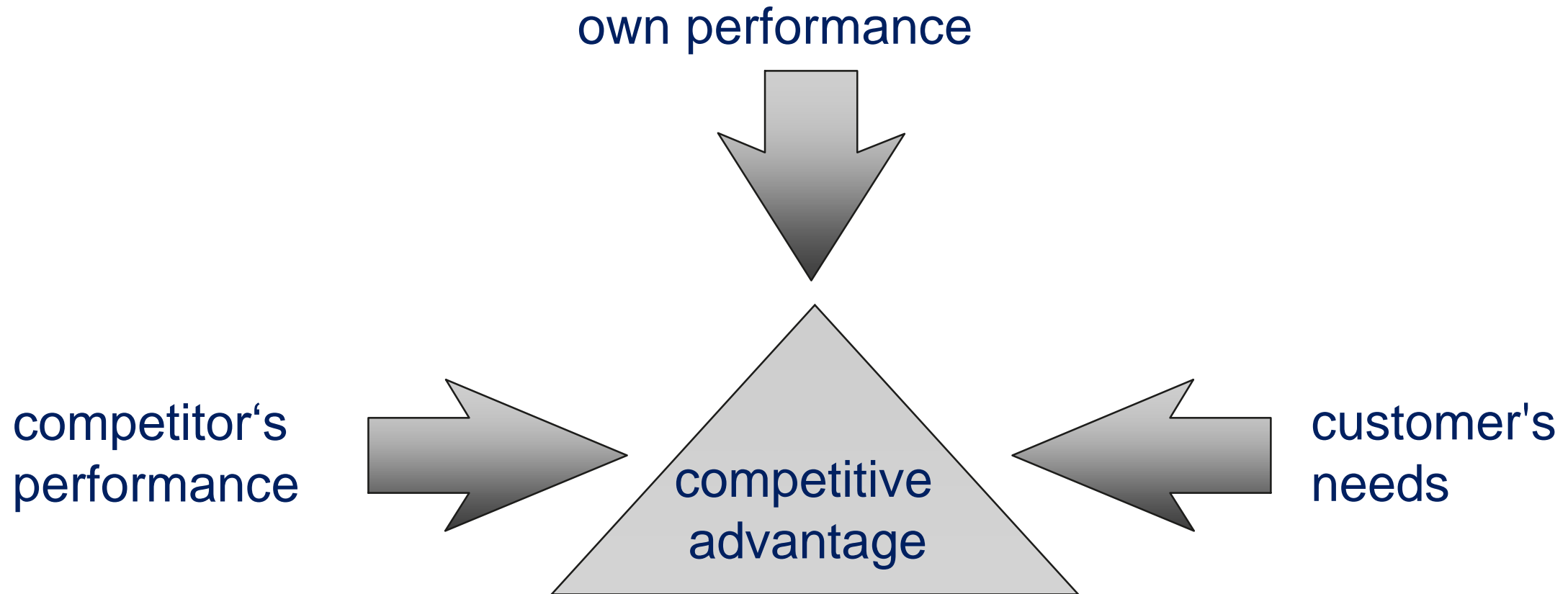
# Success Factor: Product/Service – Fitting to the German

market?

- Is the technology, the design, the after-sales service etc. of my product or service fitting to the German market?
- Who is my partner? – Who has to be my partner in order that my company will further develop?
- What does my German partner really want? – Does our product have the problem solving potential expected by our German clients?
- Does the market fit to our competence? What do we have to do to strengthen our competence for the market?
- Is the German target market a market with future potential?
- Our company has the ability to serve or cooperate with the market?
- Do we have divided the German market into segments according to our needs or has the market been „recognized“ by us in its segments?

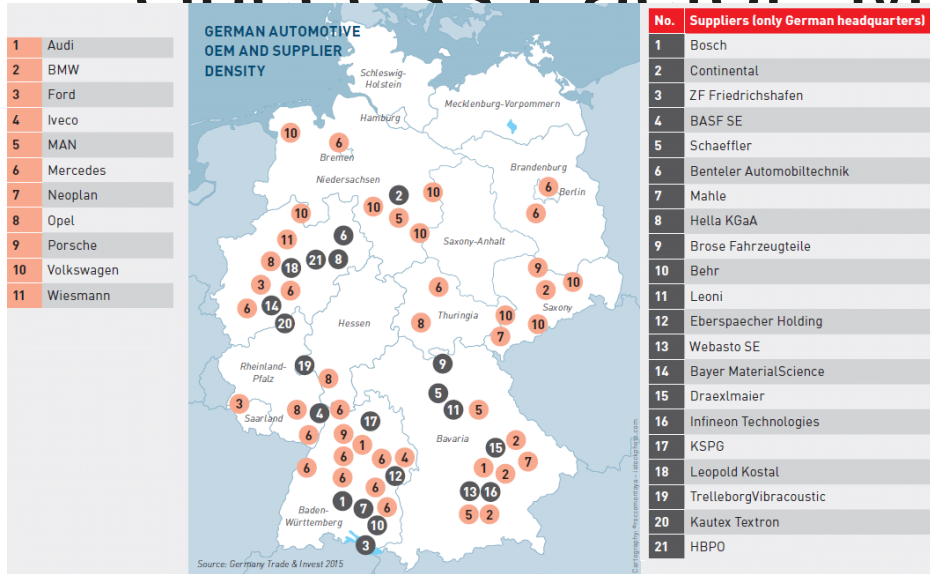
To succeed in selling your products or services in Germany or to cooperate with German companies, you need to meet what the market really wants, not what you think it wants!

# Success Factor: Product/Service – Competitive advantage



- Where can I serve my German partner's needs better than a competitor regarding an aspect which is really relevant to the partner and **in a profitable way!**

# Success Factor: Market – Germany's regional

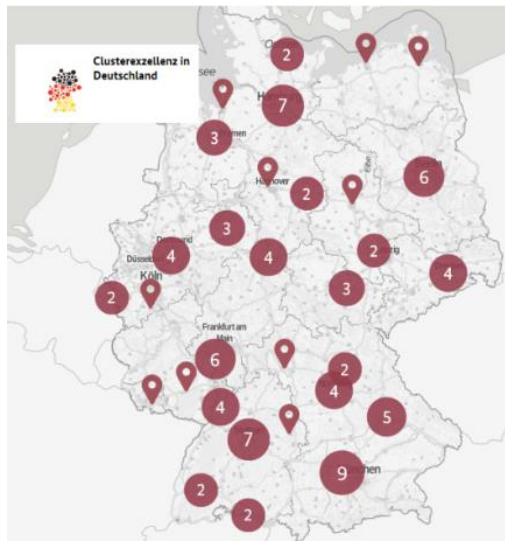


- Germany is a decentralized regional market

**There is no Centre of Germany!**

- Different sectors – different regions
- Industry is networked at state level
- Economically strongest states  
Bavaria - Baden-Württemberg - Nordrhein-Westfalen –  
Hessia - Lower Saxony
- Value Chain: East & West share tasks
- No „Tech“ Business in Top 10 Corporates
- GDP Share of Industry 25.6 % (UK <20%)
- Middle Market Family owned Hidden Champions

**Golden Rule: Do research to know the landscape of your sector!**





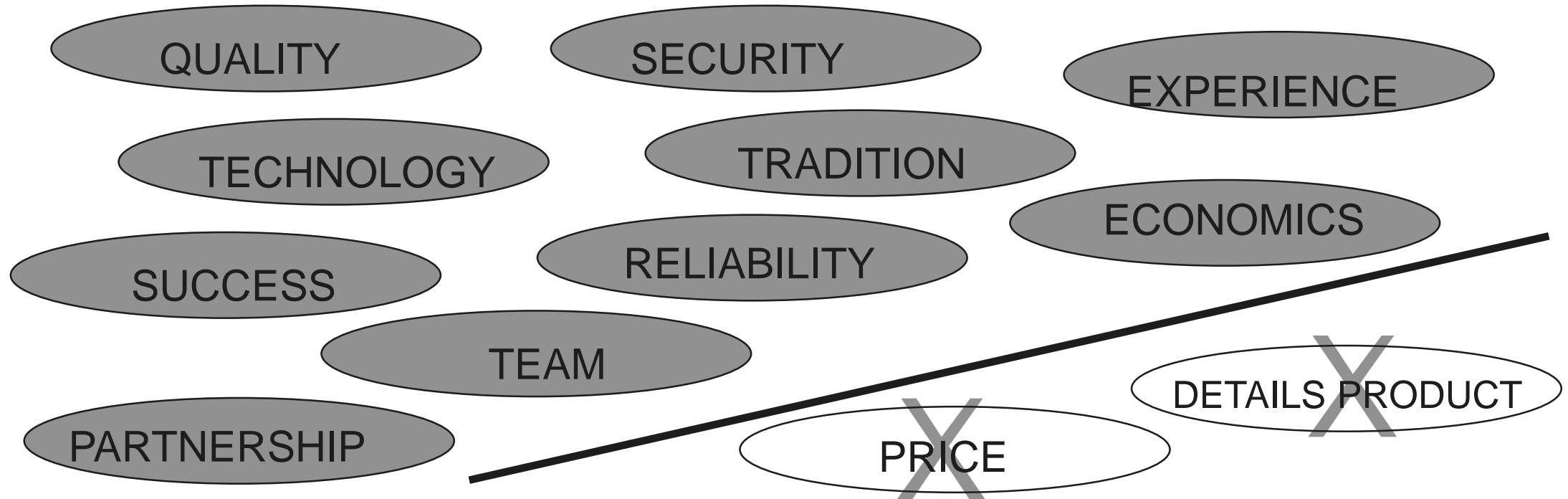
# Success Factor: People – German Customers –

- **Quality oriented** - quality is good for the customer - price follows quality
- **Process driven attitude** - rather formal („Sie“), keep it professional
- **Pedigree** - A company needs to show a detailed company information, positive track record, infrastructure, the right resources
- **Customers expect a very technical company presentation as an introduction**
- **Hierarchy matters a lot** – Germans historically are not traders, they are natural engineers who can be interested in a technical detail more than in the marketing spin
- **Target markets with the same technical approach:** Switzerland, Austria – partly Sweden, Poland

**Golden Rule: When introducing yourself – talk about hard facts only!**

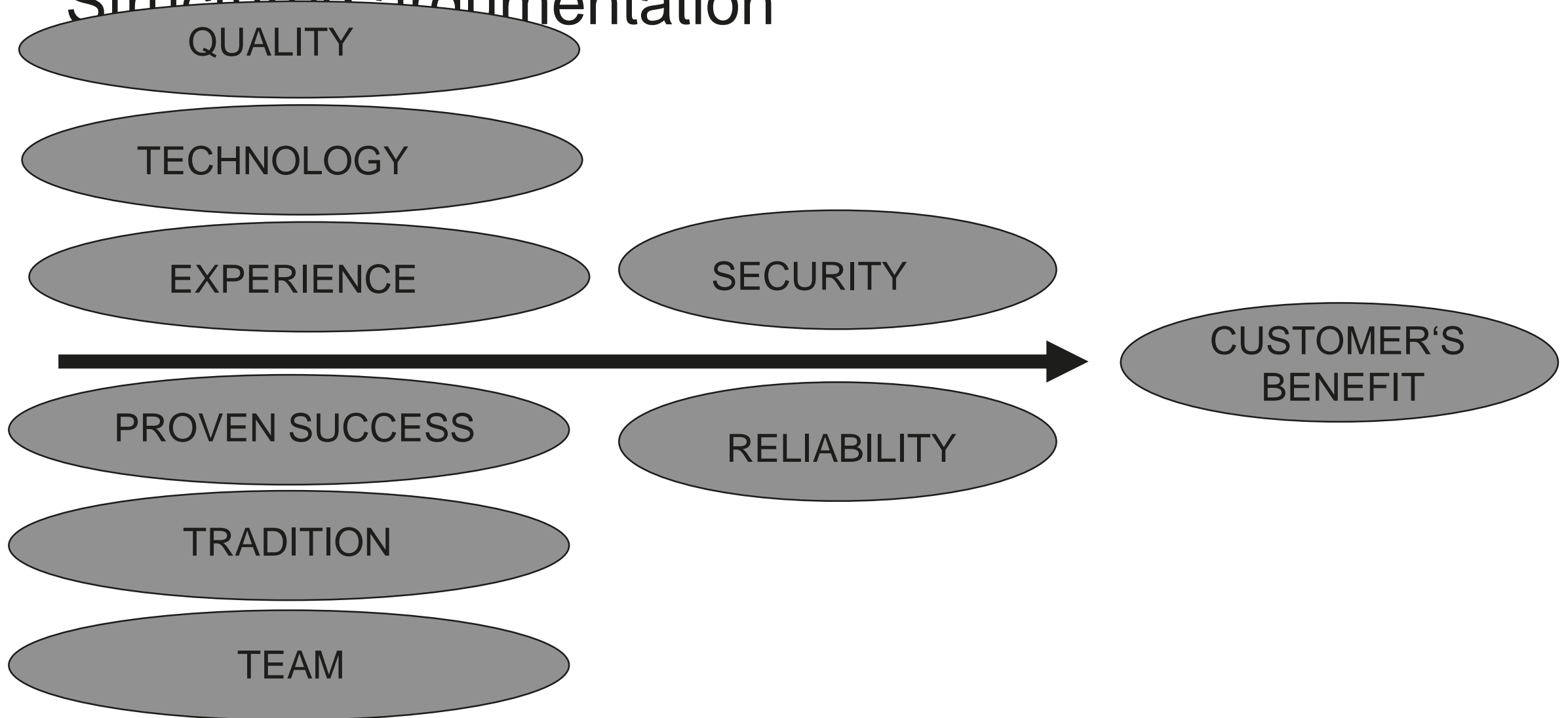
No smart & elaborate marketing, empty content talk. There are no bonus points for a great looking, flashy presentations. If it is boring for you it might be just right!

# Germany: Before pitching your product...



You need to qualify – so how to successfully introduce yourself before being allowed to offer a high quality solution according to German habits?

# Structured argumentation





How would networking opportunities in  
Germany look like?

# Upcoming trade shows for 2022



## **MCE (renewables energy efficiency)**

Milan (Italy)

8th-11th March, 2022

<https://www.mcexpocomfort.it/en/>



## **Bauma (mining and construction)**

Munich (Germany)

4th-10th April, 2022

<https://www.bauma.de/en/>



## **SwissTech (materials/ system assembly)**

Basel (Switzerland)

expected in May, 2022

<https://www.visit.swisstech-messe.ch/en/>



## **IFAT (environmental technologies)**

Munich (Germany)

30th May-3rd June, 2022

<https://www.ifat.de/en/>



## **ILA (aerospace)**

Berlin (Germany)

22nd-25th June, 2022

<https://www.ila-berlin.de/en>



## **Achema (process Manufacturing)**

Frankfurt am Main (Germany)

22nd-26th August, 2022

<https://www.achema.de/de>

# Incoming trade shows for 2022

InnoTrans



InnoTrans (transportation)

Berlin (Germany)

20th-23rd October, 2022

<https://www.innotrans.de/en/>



Orgatec (furniture and interior)

Cologne (Germany)

25th-29th October, 2022

<https://www.orgatec.com/>



K (rubber and plastics)

Düsseldorf (Germany)

19th-26th October, 2022

<https://www.k-online.com/>



Medica (med-tech)

Düsseldorf (Germany)

14th-17th November,  
2022

<https://www.medica.de/electronica> (electronics)

Munich (Germany)

15th-18th November, 2022

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**Thank you**